



### Overview

A designated *Primary Contact* for an Entity will act in an administrative and operational role for that Entity. The Primary Contact must ensure that their Entity is certified with Covered California in order to gain access to the portal. The Entity Portal also combines all of the consumers delegated to the Counselors attached to the Entity into one large Active Consumer list and allows for subsite locations to be managed for all Partners.

### What you need to know

Primary Contacts will log into their CalHEERS account and see an Entity Portal landing page, shown below.



[Customer Service 1-800-300-1506](#) | 
 [Online Chat](#) | 
 [Help](#) | 
 [My Security Profile](#) | 
 [Logout](#) | 
 [Secure Mailbox](#) | 
 [Español](#) | 
 

**CERTIFIED ENROLLMENT COUNSELORS** ▾
 DELEGATIONS ▾
 ACCOUNT ▾

**Certified Enrollment Counselors** 5 Matching Certified Enrollment Counselors


Refine Results By (reset all)


Certified Enrollment Counselors first name

Certified Enrollment Counselors last name






Status  
☐ Active  
☐ Inactive

Certification Status  
 Select ▾

Certification Enrollment Counselor Renewal Date  
 From  
 MM/DD/YYYY 

To  
 MM/DD/YYYY 

GO

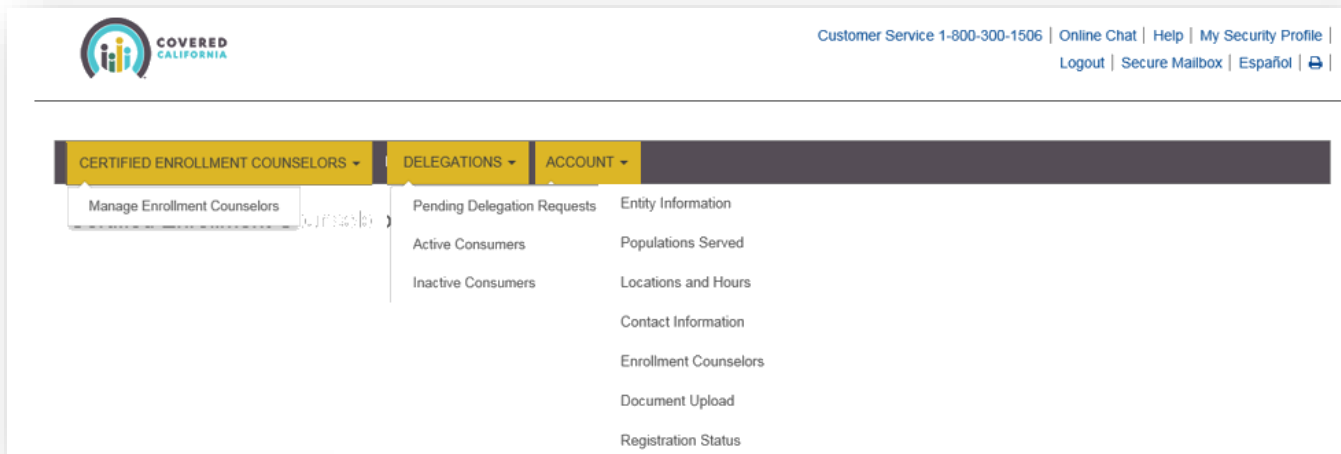
Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS	
<a href="#">Bobbie Tester</a>	0		Active	Pending	 ▾
<a href="#">CERTIFYCOUWALONEf</a> <a href="#">CERTIFYCOUWALONEf</a>	19	08/01/2017	Active	Certified	 ▾
<a href="#">Lalo Tester</a>	0		Active	Pending	 ▾
<a href="#">Monica Doe</a>	0		Active	Pending	 ▾
<a href="#">Testy McTest</a>	0		InActive	Pending	 ▾

### Entity Dashboard Navigation

The navigation bar at the top of the portal has three menu columns:

- 1) **Certified Enrollment Counselors**- Where Primary Contacts can go to manage the counselors within their Entity
- 2) **Delegations** – Where Primary Contacts can go to manage their counselor delegations
- 3) **Account** – Where Primary Contacts can go to manage their Entity Account

Primary Contacts can also visit the “**My Security Profile**” link in the upper right hand corner to update their password, email address, etc.



Refine Results By [\(reset all\)](#)

Certified Enrollment Counselors first name

Certified Enrollment Counselors last name

Status

☐ Active  
☐ Inactive

Certification Status  
 ☒

Certification Enrollment Counselor Renewal Date

From

To

The left of the dashboard has a search function, intended to assist Primary Contacts with searching for specific Counselors within their Entity Roster.

They are able to search by:

- **First and Last Name**
- **Status**
- **Certification Status**
- **Renewal Date**

The Entity Dashboard also has a roster of all counselors, new and old, displayed for the Primary Contact. It is important to note that all Counselors will display here, regardless of status. This includes Counselors that have been *Decertified*, are *Inactive*, or who are still *Pending* certification.

Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS	
Bobbie Tester	0		Active	Pending	⚙️ ▼
CERTIFYCOUWALONEf CERTIFYCOUWALONEf	19	08/01/2017	Active	Certified	⚙️ ▼
Lalo Tester	0		Active	Pending	⚙️ ▼
Monica Doe	0		Active	Pending	⚙️ ▼
Testy McTest	0		InActive	Pending	⚙️ ▼

The columns listed in the roster are:

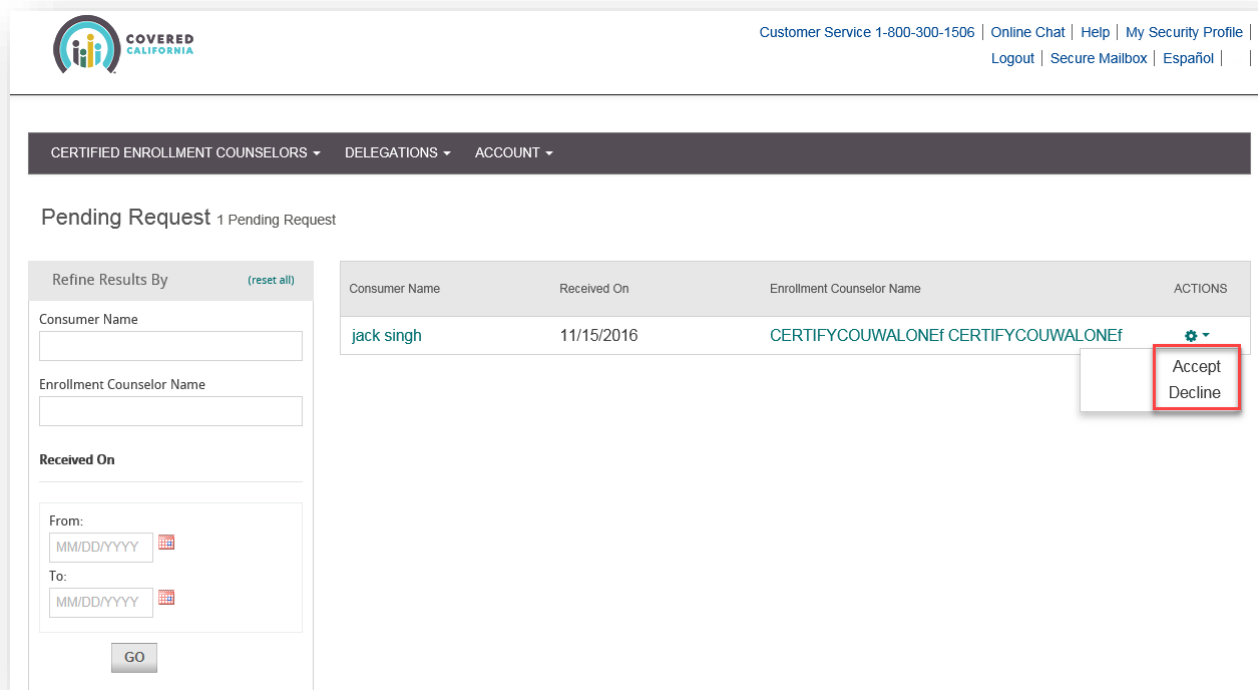
- **Name**
- **Number of Clients** – Total number of consumer cases delegated to the counselor
- **Certification Renewal for Enrollment Counselor** – Date of last certification
- **Status** – Active or Inactive, managed by the Primary Contact via the Entity Portal
- **Certification Status** – Status of the Counselor’s current certification with Covered California
- **Action Wheel** – Allows the Primary Contact to edit the status of a Counselor by selecting "Edit" from the drop-down

### Delegations Tab

#### **Pending Delegations**

The Primary Contact can select “**Pending Delegations**” link to accept or decline pending delegations on behalf of counselors within their Entity.

If they select “Decline”, the counselor will not have access to the consumer’s case and the delegation will not transfer to another counselor within the Entity.



The screenshot shows the CalHEERS Entity Portal interface. At the top, there is a navigation bar with the Covered California logo and links for Customer Service (1-800-300-1506), Online Chat, Help, My Security Profile, Logout, Secure Mailbox, and Español. Below the navigation bar is a dark header with links for CERTIFIED ENROLLMENT COUNSELORS, DELEGATIONS, and ACCOUNT. The main content area is titled "Pending Request" and shows "1 Pending Request". On the left, there is a "Refine Results By" section with input fields for "Consumer Name", "Enrollment Counselor Name", and "Received On" (with "From" and "To" date pickers). A "GO" button is at the bottom of this section. The main table displays the pending request for "jack singh", received on "11/15/2016", by "CERTIFYCOUWALONEf CERTIFYCOUWALONEf". An "ACTIONS" column on the right contains a gear icon and a dropdown menu with "Accept" and "Decline" options, which are highlighted with a red box.

### Active Consumer List

The Active Consumer list contains a comprehensive list of all consumers delegated to a Counselor within the Entity. The list contains:

- **Consumer Name**
- **Active Since**
- **Enrollment Counselor Name**
- **Enrollment Status**
- **Current Status**
- **Action Wheel** – Where the Primary Contact can mark the consumer delegation “Inactive” and view consumer details.

The Primary Contact can also utilize the search function on the left to locate a specific consumer by:

- **Name**
- **Enrollment Status**
- **Current Status**
- **Active Date**

CERTIFIED ENROLLMENT COUNSELORS ▾

DELEGATIONS ▾

ACCOUNT ▾

Active Delegations 14 Active Delegations(s)

To simultaneously change the delegations of more than one consumer from one Enrollment Counselor to another, click on the checkbox by the consumer's name, click on the **Change Delegation** button that appears and select the **Change Delegation** option. A pop-up will appear where you can search for the new enrollment counselor to whom the selected consumers should be re-delegated.

( 0 Items Selected )

Refine Results By (reset all)

Consumer Name

Enrollment Counselor Name

Enrollment Status

Select Enrollment Status ▾

Current Status

Select Current Status ▾

Active Since

From: MM/DD/YYYY

To: MM/DD/YYYY

GO

<input type="checkbox"/>	Consumer Name	Active Since	Enrollment Counselor Name	Enrollment Status	Current Status	Action
<input type="checkbox"/>	IndCecAppDa d IndCecAppD ad	02/16/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf		Application Withdrawn	
<input type="checkbox"/>	IndCecAppDa d IndCecAppD ad	02/16/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf			
<input type="checkbox"/>	IndCecAppDa d IndCecAppD ad	02/16/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf			
<input type="checkbox"/>	IndCecAppDa d IndCecAppD ad	02/16/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf			
<input type="checkbox"/>	IndCecAppDa d IndCecAppD ad	02/16/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf			
<input type="checkbox"/>	IndCecAppDa d IndCecAppD ad	02/16/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf	PENDING		
<input type="checkbox"/>	IndCecAppDa d IndCecAppD ad	02/16/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf	PENDING		
<input type="checkbox"/>	IndCecAppDa d IndCecAppD ad	02/16/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf	PENDING		
<input type="checkbox"/>	IndCecAppDa d IndCecAppD ad	02/17/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf	PENDING		
<input type="checkbox"/>	Jay Unsub	02/01/2017	CERTIFYCOUWALONEf CERTIFYCOUWALONEf		Case Inactive	

1

2

### Inactive Delegations

The Inactive Consumers page will display any consumer delegation that has been marked inactive for any Counselor within the Entity.

It will display:

- **Consumer Name**
- **Inactive Since Date**
- **Enrollment Counselor Name**

Covered California Outreach and Sales Division  
OutreachandSales@covered.ca.gov

October 24, 2018

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CERTIFIED ENROLLMENT COUNSELORS ▾
DELEGATIONS ▾
ACCOUNT ▾

Inactive Consumers 4 Inactive Consumer

Refine Results By (reset all)

Consumer Name

Enrollment Counselor Name

Inactive Since

From:

To:

GO

Consumer Name	In-Active since	Enrollment Counselor Name
<a href="#">Joe Enrolled</a>	02/01/2017	<a href="#">CERTIFYCOUWALONEf CERTIFYCOUWALONEf</a>
<a href="#">Unsub Term</a>	02/01/2017	<a href="#">CERTIFYCOUWALONEf CERTIFYCOUWALONEf</a>
<a href="#">John Enrolled</a>	02/01/2017	<a href="#">CERTIFYCOUWALONEf CERTIFYCOUWALONEf</a>
<a href="#">Mary Tester</a>	02/02/2017	<a href="#">CERTIFYCOUWALONEf CERTIFYCOUWALONEf</a>

## Account Tab

### Entity Information

The information on the Entity Information page displays what was entered by the Certification Services Team at Covered California for the Entity during onboarding.

CERTIFIED ENROLLMENT COUNSELORS ▾
DELEGATIONS ▾
ACCOUNT ▾

Steps

Entity Information

Populations Served

Locations and Hours

Contact Information

Certified Enrollment Counselors

Document Upload

Registration Status

Entity Information

Entity Number 10000

Entity Type In-Person Assistance

Certified Enrollment Entity name QATAX WALLST ONEb

Business Name (Legal) QATAX WALLST ONEb

Primary Email Address e@email.com

Primary Phone Number (805)5

Secondary Phone Number (805)5

Fax Number (805)5

How would you like this person to be contacted? Phone

Federal Tax ID 6553

State Tax ID 8765

Organization Type Community-Based organization

Counties You Serve Santa Barbara

Did your organization receive an Outreach and Education Grant? No

**NOTE:** Any changes of information made to this section must be made by submitting a change request through the Portal or by emailing [CommunityPartnerCertSupport@covered.ca.gov](mailto:CommunityPartnerCertSupport@covered.ca.gov). Use of this "EDIT" button may lead to entity deactivation and/or permanent loss of consumer delegations ("book of business").

### Population Served

The Population Served page displays the Languages, Ethnicities, and Industries serviced by the Entity. It shows a total of all Counselors within the Entity that speak a certain language, the percentage that services a certain ethnic group, and the percentage of counselors that are within a certain industry.

CERTIFIED ENROLLMENT COUNSELORS

DELEGATIONS

ACCOUNT

Steps

Entity Information

Populations Served

Locations and Hours

Contact Information

Certified Enrollment Counselors

Document Upload

Registration Status

Populations Served

EDIT

▼ Languages

Check all languages of your target population and specify percentages accordingly.

Language *	Estimated percent of in language assistance *	Number of staff who speak the language fluently *
<input checked="" type="checkbox"/> English	20	5
<input checked="" type="checkbox"/> Arabic	20	5
<input checked="" type="checkbox"/> Armenian	20	5
<input checked="" type="checkbox"/> Farsi	20	5
<input checked="" type="checkbox"/> Cantonese	20	5
<b>Total</b>	100%	

▼ Ethnicities

Check all ethnicities of your target population and specify percentages accordingly.

Ethnicity *	Estimated percent planned to serve *
<input checked="" type="checkbox"/> Armenian	100
<b>Total</b>	100%

▼ Industries

Check all industries that apply, and provide percentages per industry.

Industries *	Estimated percent planned to serve *
<input checked="" type="checkbox"/> Health Care	100
<b>Total</b>	100%

**NOTE:** Any changes of information made to this section must be made by submitting a change request through the Portal or by emailing [CommunityPartnerCertSupport@covered.ca.gov](mailto:CommunityPartnerCertSupport@covered.ca.gov). Use of this "EDIT" button may lead to entity deactivation and/or permanent loss of consumer delegations ("book of business").

### Location and Hours

The **Location and Hours** page is where the Entity can add new subsites for their organization. This is important because Counselors must be assigned to a site located in this section and it overwrites the address location entered at the counselor level on their profile page.

Entities can also edit and modify hours of operation for all sites on this page.

CERTIFIED ENROLLMENT COUNSELORS
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Registration Status

Site NameAddress

ADD SUB-SITE

Village Library3755 Constellation Rd 19 Lompoc CA

EDIT

Site NameVillage Library

Primary Email Addressspace@email.com

Primary Phone Number(805)555-1701

Secondary Phone Number(805)555-1701

Hours of Operation

Monday8:00 - 16:00

Tuesday8:00 - 16:00

Wednesday8:00 - 16:00

Thursday8:00 - 16:00

Friday8:00 - 16:00

SaturdayClosed - Closed

SundayClosed - Closed

Mailing Address

Street Address3755 Constellation Rd

Suite19

CityLompoc

StateCalifornia

Zip code93436

Physical Address

Street Address5573 Constellation Rd 19

Suite19

CityLompoc

StateCalifornia

Zip code93436

Languages Supported

Spoken Languages SupportedEnglish, Spanish, Tagalog

Written Languages SupportedEnglish, Russian, Spanish, Tagalog

Test Sub-Site123 W Street Sacramento CA
South Sub-Site4321 5th St Sacramento CA

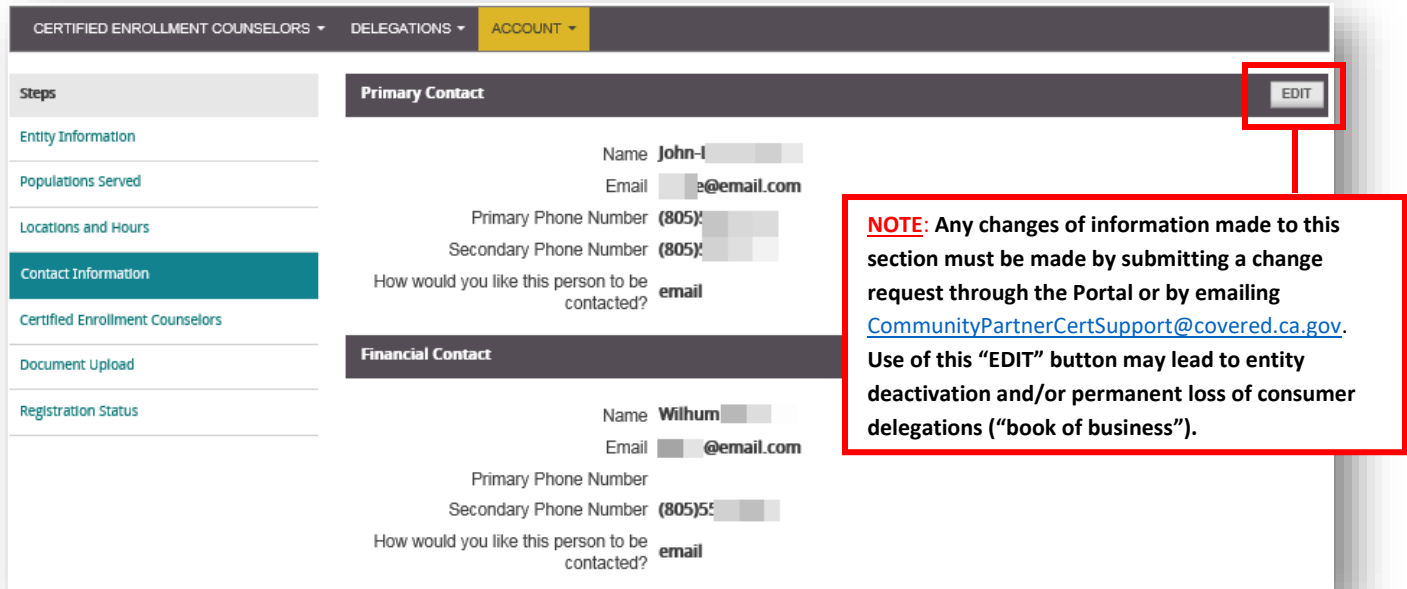
**NOTE:** Any changes of information made to this section must be made by submitting a change request through the Portal or by emailing [CommunityPartnerCertSupport@covered.ca.gov](mailto:CommunityPartnerCertSupport@covered.ca.gov). Use of this "EDIT" button may lead to entity deactivation and/or permanent loss of consumer delegations ("book of business").



### Contact Information

The **Contact Information** page lists the contact information for the Entity. It will list the Primary Contact and the Financial Contact for the Entity.

**Note:** Although CalHEERS uses the term "Financial Contact," the individual entered here will be the Authorized Contact for the entity as shown in the Portal.



**Primary Contact**

Name: John-I [redacted]  
 Email: [redacted]@email.com  
 Primary Phone Number: (805) [redacted]  
 Secondary Phone Number: (805) [redacted]  
 How would you like this person to be contacted? email

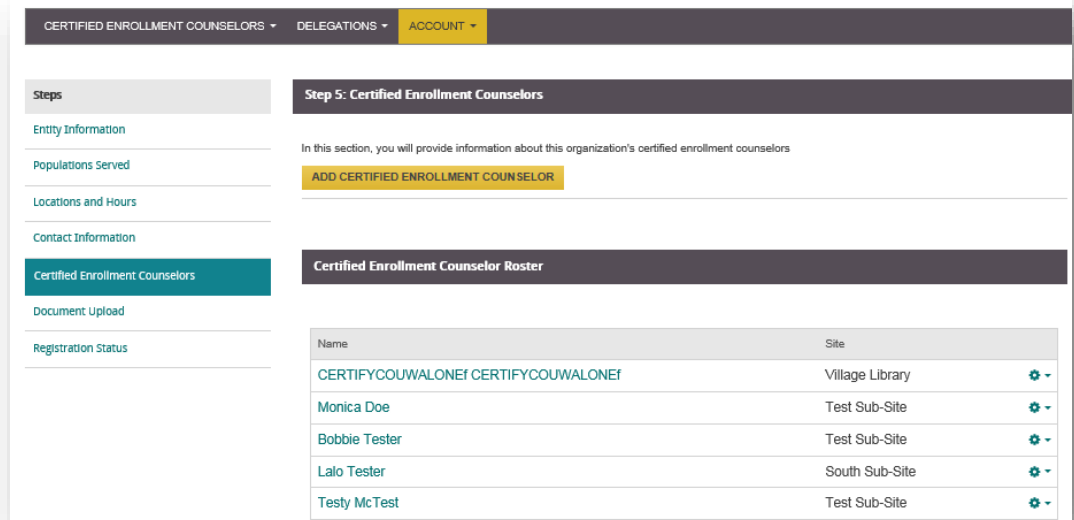
**Financial Contact**

Name: Wilhum [redacted]  
 Email: [redacted]@email.com  
 Primary Phone Number: [redacted]  
 Secondary Phone Number: (805)5 [redacted]  
 How would you like this person to be contacted? email

**NOTE:** Any changes of information made to this section must be made by submitting a change request through the Portal or by emailing [CommunityPartnerCertSupport@covered.ca.gov](mailto:CommunityPartnerCertSupport@covered.ca.gov). Use of this "EDIT" button may lead to entity deactivation and/or permanent loss of consumer delegations ("book of business").

### Certified Enrollment Counselors

The **Certified Enrollment Counselor** page displays a list of counselors within the Entity and their Primary Site Location. There is also an option to select the "Action Wheel" and edit a counselor from this page. The *Primary Contact* can also click the name of the Counselor to view their Counselor information.



**Step 5: Certified Enrollment Counselors**

In this section, you will provide information about this organization's certified enrollment counselors

**ADD CERTIFIED ENROLLMENT COUNSELOR**

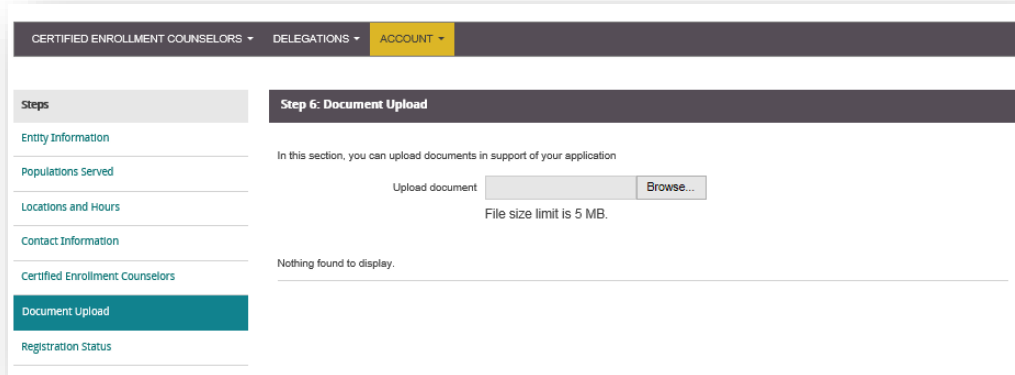
**Certified Enrollment Counselor Roster**

Name	Site	
CERTIFYCOUWALONE CERTIFYCOUWALONE	Village Library	⚙️
Monica Doe	Test Sub-Site	⚙️
Bobbie Tester	Test Sub-Site	⚙️
Lalo Tester	South Sub-Site	⚙️
Testy McTest	Test Sub-Site	⚙️

### Document Upload

The document upload page is available for Entities to upload documents requested by Covered California.

**Note:** Currently this function is not used and all Primary Contacts should follow normal procedures for submitting documents to Covered California.

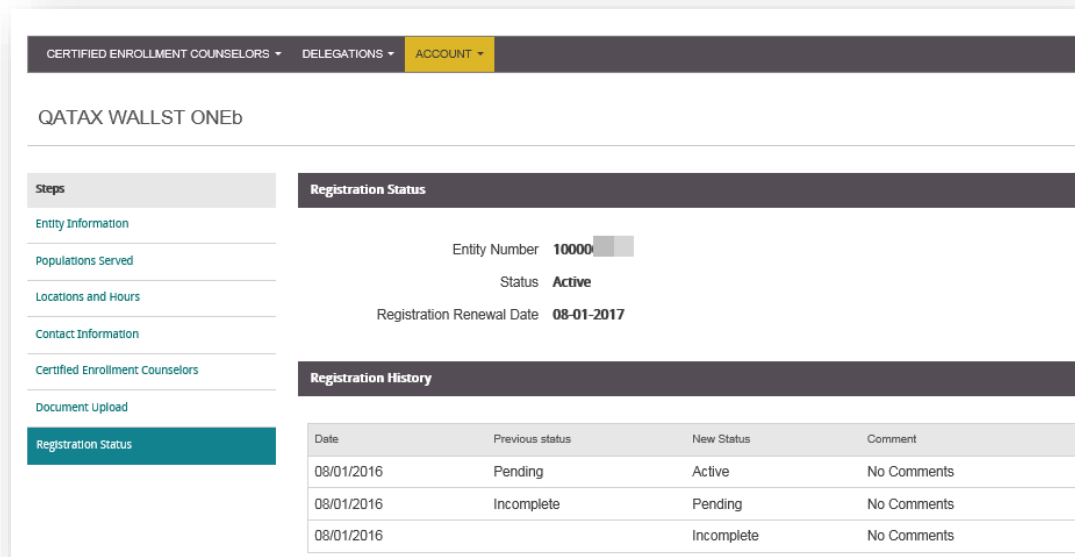


### Registration Status

The **Registration Status** page displays:

- **Entity Number** (Assigned by the Covered California Certification Services Team)
- **Status**
- **Registration Renewal Date**

The page also displays a Registration History section that displays a list of all registration changes that have happened for the Entity since its CalHEERS creation.



Date	Previous status	New Status	Comment
08/01/2016	Pending	Active	No Comments
08/01/2016	Incomplete	Pending	No Comments
08/01/2016		Incomplete	No Comments